Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

(Revised 1/3/11)

RECPUTARY OF THE SENATE

Post-Travel Filing Instructions: Complete this form within 30 days of returning from 16 OCT 28 AM 11: 13 travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rube reimbursed/paid for			sures with respect to	travel expenses that have been or will
☐ The <u>original</u> Employ ☐ A <u>copy</u> of the Priva	te Sponsor Travel Ce.	rization (Form RE-1), <u>A</u> rtification Form with all	ND attachments (itinerar	y, invitee list, etc.)
Private Sponsor(s) (list	The Heritage	Foundation		
10/12/ Travel date(s):	16 - 10/14/16			
Name of accompanying		nu). N/A		
Relationship to Travele				
	OSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit		
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	\$0	\$196.56	\$118	\$8 - notebook
🖾 Actual Amount				\$1 - pen
Expenses for Accomp	anying Spouse or De	ependent Child (if applic	able):	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate				
☐ Actual Amount				
necessary.): Met with the program to following topics: (story o safety, and a supreme content of the safety and a supreme content of the	go over the retreat ager f President Lincoln, skill ourt preview) Attended a nce of understanding yo	nda; had 5 meals with the ot sets needed to be a leader, a dinner with a key note spe our boss in order to perform	her participants which i countering islamic terr aker (former U.S. Air Fo	Attach additional pages if included lectures concerning the orism, fiscal malpractice, cyber orce Thunderbirds' Commander) who e. Overall, the experience left me with
10/24/16	Jake Bailey	<u> </u>		De Bury
(Date)	(Printed)	name of traveler)		(Signature of traveler)
TO BE COMPLETED	D BY SUPERVISING	MEMBER/OFFICER:		
I have made a determine Authorization form, an	nation that the expense necessary transports	es set out above in connection, lodging, and related	ections with travel de dexpenses as defined	scribed in the Employee Pre-Travel in Rule 35.
10/24/16			M (amicing Sangton/Officer)
(Date) (Revised 1/3/11)			(эіднаште ој зире	ervising Senator/Officer) Form RE-2

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Amended Form
originally submitted
09-12-16
BUT

Name of Traveler:	Jake Bailey
Employing Office/Committee:	Senator Tom Cotton
Heritage Foundation Private Sponsor(s) (list all):	
•	
10/12/16-10/14/16 Travel date(s):	
Note: If you plan to extend the trip for any	reason you <u>must</u> notify the Committee.
Bedford Springs, PA Destination(s):	
Explain how this trip is specifically connected to the	ne traveler's official or representational duties:
terrorism. Along with other issues, this in	oming challenges for next Congress such as Islamic formation will be pertinent to my role in Senator Cotton's ering defense and homeland security issues.
Name of accompanying family member (if any): Relationship to Employee: Spouse Child	
I certify that the information contained in this forn	is true, complete and correct to the best of my knowledge:
9/2011	July Barly
(Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENATOR	OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms
Secretary for the Majority, Secretary for the Minority, a	nd Chaplain):
Senator Tom Cotton 💪	Jake Bailey hereby authorize
(Print Senator's/Officer's Name)	(Print Traveler's Name)
related expenses for travel to the event described a	by the payment or reimbursement for necessary transportation, lodging, and bove. I have determined that this travel is in connection with his or her distributed will not create the appearance that he or she is using public office for
I have also determined that the attendance of the e	mployee's spouse or child is appropriate to assist in the representation
of the Senate. (signify "yes" by checking box)	
9/2016	7m at
(Date)	(Signature of Supervising Senator/Officer)

	Attendee List				
Last Name	First Name	Office	Title		
Bailey	Jake	Office of Sen. Tom Cotton	Legislative Correspondent		
Bathon	Mary	Office of Sen. Mike Lee	Legislative Correspondent		
Carr	Kerrie	Office of Sen. Jeff Sessions	Legislative Correspondent		
Chestnut	Annie	Office of Sen. Ron Johnson	Legistative Correspondent		
DiPlacido	Mark	Office of Sen. Ben Sasse	Research Associate		
Harst	Lisa	Office of Sen. Tom Cotton	Junior Legislative Assistant		
Orr	Caleb	Office of Sen. Marco Rubio	Legislative Assistant		
Shannon	Matt	Office of Sen. Tom Cotton	Legislative Correspondant		
Smith	Robby	Office of Sen. Mike Lee	Legislative Correspondent for Defense and Foreign Relations		
Truluck	Sutton	Office of Sen. Marco Rubio	Legislative Correspondent		
Welborn	Abigail	Office of Sen. Tom Cotton	Legislative Correspondent		
Williams	Avery	Office of Sen. John Barrasso	Legislative Correspondent		

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

	The Heritage Foundation Sponsor(s) of the trip (please list all sponsors):
	Description of the trip: An educational retreat for conservative Congressional staff which will focus on legislative issues.
- . !	Dates of travel: 10/12/16-10/14/16
	Place of travel: Bedford, PA
	Name and title of Scnate invitees: See attached
	l certify that the trip fits one of the following categories: (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. OR-
	□ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
•	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal. -AND-
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	I certify that: The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. AND
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

officer, or employee on any segment of the trip. OR - (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10). OR - (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. 10. USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:	9,	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee <i>on any segment</i> of the trip (<i>see questions 6 and 10</i>). OR - OR		overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. 10. USE ONLY IF YOU CHECKED QUESTION 9(8) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel: 11. An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hour by-hour), complete, and final itinerary for the trip. 12. Briefly describe the role of each sponsor in organizing and conducting the trip: The Heritage Foundation is the sole sponsor of the trip and is solely responsible for the execution of it. 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission. 14. Briefly describe each sponsor's prior history of sponsoring congressional trips: The Heritage Foundation has hosted a House member retreat called the "Conservative Members Retreat annually for more than a decade. Additionally, Heritage has hosted several staff retreats pursuant to		overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
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		educatrional fellowships.

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	etion hosts nearly 500 ed	lucational events on	Capitol Hill each yea	ar. These include
educaitonal fellowshi	ps, topical briefings, and	working groups.		
Total Expenses for Ea	ach Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
Good Faith estimate	\$75	\$91/ Night \$182 total	10/12- \$41 10/13- \$51 10/14- \$23 Total - \$115	\$50- Writte materials, pe notebooks
Amounts				
participation or b) the congressional particip	rip involves an event that trip involves an event to pation: d specifically with regard	hat is arranged or o	rganized specifically	d to congression with regard to
participation or b) the congressional participation. The event is arrange	e trip involves an event to pation: d specifically with regard	hat is arranged or or	rganized specifically	d to congression with regard to
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21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	The daily expenses meet the federal per diem rate.
	····
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	Attendees will travel in a charter bus.
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
25.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.): Signature of Travel Sponsor: Ed Complete
	Name and Title: Ed Corrigan, Group Vice President
	Name of Organization: The Heritage Foundation
	Address: 214 Massachusettes Ave Washington DC 20002
	Telephone Number: 202-546-4400
	Fax Number:
	E-mail Address: ed.corrigan@heritage.org





YOU'RE INVITED TO THE

emerging LEADERS

2016 RETREAT

HOSTED BY
The Heritage Foundation

WEDNESDAY, OCTOBER 12 -FRIDAY, OCTOBER 14, 2016

OMNI BEDFORD SPRINGS | BEDFORD, PA

PLEASE JOIN US!

The inaugural Emerging Leaders Retreat will take place in Bedford Spring, PA, October 12-14. Promising conservative staff from across Capitol Hill will be joined by conservative policy experts at the top of their field. Attendees will explore the issues facing the next Congress, sharpen their operational skills, and hone in their knowledge of process, rules and procedure. An educational experience tailored to work on Capitol Hill in 2016, this retreat also promises an excellent opportunity to grow your network amongst your colleagues and expand your impact.

TO REGISTER FOR THIS EVENT, PLEASE:

Submit Ethics Travel Forms by Monday, September 12, 2016, and RSVP online at Events. Heritage.org/Leaders 2016

Transportation

Wednesday, October 12

Please arrive to The Heritage Foundation by 11:45 a.m. Buses will depart by 12:00 p.m. for the Omni Bedford Springs.

Friday, October 14

Buses will depart the Omni by 1:00 p.m. and return to The Heritage Foundation by 4:00 p.m.

Questions

For travel and logistics questions, please contact Tommy Binion at (202) 608-6188 or thomas.binion@heritage.org.



Emerging Leaders 2016 Retreat

Wednesday, October 12 - Friday, October 14, 2016 Omni Bedford Springs | Bedford, Pennsylvania

AGENDA

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WEDNESDAY, OCTO	BER 12, 2016	
11:30 — 12:00 p.m.	Attendee Check-In Attendees leave luggage at the bus after check-in Boxed lunches provided on board the bus	The Heritage Foundation 214 Massachusetts Ave., NE
12:00 p.m.	Attendees board the bus	
12:15 p.m.	Buses depart to Omni Bedford Springs	
3:15 p.m.	Buses arrive at Omni Bedford Springs	
3:30 – 5:30 p.m.	REGISTRATION Attendees check-in to overnight rooms	Omni Bedford Springs
5:30 – 6:30 p.m.	WELCOME AND RETREAT OVERVIEW	Front Lawn
	Gerren McHam Congressional Fellowship and Outreach Program Manager, The Heritage Foundation	
	Genevieve Wood Senior Fellow in Communications, The Heritage Foundation and Senior Contributor, The Daily Signal	
6:30 - 8:30 p.m.	OPENING DINNER	Reagan Room, Ground Floor
	Steve Moore Distinguished Visiting Fellow, The Heritage Foundation	
8:30 – 9:30 p.m.	EVENING CAMPFIRE DISCUSSION ON LEGENDARY STORIES OF AMERICAN LEADERS	Front Lawn
	James Swanson Senior Research Scholar, The Heritage Foundation	

Author of New York Times Best Seller,

Manhunt: The 12-Day Chase for Lincoln's Killer

THURSDAY, OCTOBER 13, 2016

9:00 - 10:30 a.m.

BREAKFAST ADDRESS

Colonnade Ballroom, 1st Floor

Keynote and Q&A will focus on the skillsets and attributes necessary to establish yourself as a

leader and someone others will follow. It will also spotlight practical examples that

congressional staffers can relate to and highlight the importance of courage during adverse

situations.

Jim DeMint, President, The Heritage Foundation

10:30 - 10:45 a.m.

BREAK

10:45 a.m. - 12:00 p.m.

EMERGING ISSUE #1:

Colonnade Ballroom, 1st Floor

COUNTERING ISLAMIC TERRORISM

The United States is facing what is arguably the most concentrated period of terrorist activity in the homeland since 9/11. The perpetrators are primarily a makeup of those supportive or have pledged allegiance to ISIS. As ISIS continues soliciting support for its radical cause within our borders and around the world, the United States must strengthen its

counterterrorism readiness.

Daveed Gartenstein-Ross

Senior Fellow, Foundation for Defense of Democracies

Alex Hitchens

Head of Research, International Centre for the Study of Radicalisation and Political Violence

Robin Simcox (Moderator)

Margaret Thatcher Fellow, The Heritage Foundation

12:00 – 12:15 p.m.

BREAK

12:15 – 2:00 p.m.

LUNCHEON AND

Eisenhower Ballroom, 2nd Floor

EMERGING ISSUE #2: COLLUSION V. CONFLICT

Through acts of fiscal malpractice, the United States is over \$19 trillion in debt—and that figure is rapidly climbing. However, we didn't arrive at this point overnight... Rather than embracing conflict and holding to fiscal sanity, a perpetual "go along to get along" mentality has led the country to financial instability. We must stem the tide before it's too late.

Paul Winfree

Director, Thomas A. Roe Institute for Economic Policy Studies and Richard F. Aster Fellow

The Heritage Foundation

2:00-2:15 p.m.

BREAK

THURSDAY, OCTOBER 13, 2016 (CONT.)

2:15 - 3:15 p.m.

EMERGING ISSUE #3:

Colonnade Ballroom, 1st Floor

SEEKING SAFETY IN THE CYBER WORLD

Almost everything in our society revolves around a digital platform. But through our major technological advances come vulnerabilities that place the security of our nation at risk. How are we to address cybersecurity, internet privacy versus information sharing and privacy in our country? In addition, there are those advocating for the United States to surrender its oversight of the internet, leaving many to wonder how such a transition will impact the nation.

Steve Bucci

Visiting Fellow, Defense Center, Allison Center, and Truluck Leadership Center The Heritage Foundation

Berin Szoka

President and Founder, TechFreedom

Genevieve Wood (Moderator)

Senior Fellow in Communications, The Heritage Foundation and Senior Contributor, The Daily Signal

3:15 - 3:30 p.m.

BREAK

3:30 – 4:30 p.m.

EMERGING ISSUE #4:

Colonnade Ballroom, 1st Floor

THE ECONOMICS OF ENERGY AND CLIMATE SCIENCE

Most Americans want low cost energy, while maintaining a healthy environment. However, people take energy for granted without any appreciation for the work it takes to produce this resource. Now "protecting" the environment has become synonymous with the 'climate change' debate, ignoring how these two facets interact with market forces.

Nicolas Loris

Herbert and Joyce Morgan Research Fellow in Energy and Environmental Policy The Heritage Foundation

Rachel Boyard

Director, Policy Services, The Heritage Foundation

4:30 - 5:00 p.m.

BREAK

5:00 - 6:00 p.m.

EMERGING ISSUE #5: SUPREME COURT PREVIEW

Colonnade Ballroom, 1st Floor

Important cases await the Supreme Court when they return in the fall. With only eight justices, the balance of the judicial branch is in jeopardy, leaving many to deliberate on the various outcomes conservatives may encounter leading into 2017. This session will discuss actual cases with wit to be decided by the Supreme Court.

Hans von Spakovsky

Manager, Election Law Reform Initiative and Senior Legal Fellow

The Heritage Foundation

THURSDAY, OCTOBER 13, 2016 (CONT.)

6:00 - 7:00 p.m. Break and Optional Discussion

7:00 – 9:00 p.m. DINNER & KEYNOTE ADDRESS The Mill, across the street from hotel

Address: J.V. Venable

Senior Research Fellow for Defense Policy, The Heritage Foundation

Former U.S. Air Force Thunderbirds' Commander

9:00 p.m. EVENING NETWORKING AND DISCUSSION

FRIDAY, OCTOBER 14, 2016

8:30 a.m. Luggage Drop-off First Ladies' Lounge

Attendees leave their luggage at the Heritage luggage check (across from Colonnade)

9:00 – 10:00 a.m. Breakfast: Findings from American Colonnade Ballroom, 1st Floor

Perceptions Initiative (API) Message Testing

ON KEY ISSUES FACING CONGRESS

Dee Allsop

Managing Partner, Heart+Mind Strategies

Genevieve Wood (Moderator)

Senior Fellow in Communications, The Heritage Foundation

and Senior Contributor, The Daily Signal

10:00 - 10:15 a.m. BREAK

10:15 - 11:15 a.m. ADDRESSING THE ISSUES AND Colonnade Ballroom, Ist Floor

ADVANCING THE BALL IN THE 115TH

Ed Corrigan

Group Vice President for Policy Promotion, The Heritage Foundation

Russ Vought

Vice President of Grassroots Outreach, Heritage Action for America

Tommy Binion (Moderator)

Director, Policy Outreach, The Heritage Foundation

11:15 - 11:30 a.m. BREAK

FRIDAY, OCTOBER 14, 2016 (CONT.)

11:30 a.m. - 12:30 p.m. BUILDING A COALITION TO ACHIEVE

Colonnade Ballroom, I' Floor

CONSERVATIVE VICTORIES

Justin Ouimette

Executive Director, House Freedom Caucus

Scott Parkinson

Executive Director, Republican Study Committee

Brittan Specht

Policy Director, Republican Study Committee

Rachel Bovard

Director, Policy Services, The Heritage Foundation

Tommy Binion (Moderator)

Director, Policy Outreach, The Heritage Foundation

12:30 p.m. – 1:00 p.m. CLOSING REMARKS

1:00 p.m. Conference Concludes

Attendees board buses; boxed lunches provided on board

1:00 p.m. Buses depart the Omni Bedford Springs

4:00 p.m. Buses arrive at The Heritage Foundation



Emerging Leaders 2016 Retreat

Wednesday, October 12 - Friday, October 14, 2016 Omni Bedford Springs | Bedford, Pennsylvania

INVITATION LIST

About the List:

The following individuals were extended an invitation to The Heritage Foundation's Emerging Leaders 2016 Retreat due to their interest in conservative policy making and their status as emerging leaders.

Last Name	First Name	Office	Title
Anthony	Stephen	Senator Tom Cotton	Director of Correspondence
Arias	Jonathan	Senator Marco Rubio	Legislative Aide
		Sametan Tod Cruz	Legislative Correspondent
Arlantico	Patrick	Senator Ted Cruz	Legislative Correspondent Legislative Aide
Asbill	Courtney	Senator Ted Cruz	Legislative Attac
Ayres	Ben	Senator David Perdue	Legislative Correspondent
Bailey	Jake	Senator Tom Cotton	Legislative Correspondent
Bathon	Mary	Senator Mike Lee	Legislative Correspondent
Beckwith	Arian	Senator John Boozman	Legislative Aide
Bishop	Trent	Senator Cory Gardner	Legislative Correspondent
Boh	Patricia	Senator Tom Cotton	Legislative Correspondent
Call	Kelsey	Senator Mike Lee	Staff Assistant
Carr	Kerrie	Senator Jeff Sessions	Legislative Correspondent
Cato	Sierra	Senator David Vitter	Staff Assistant
Chestnut	Annie	Senator Ron Johnson	Legislative Correspondent
Clowser	Jessica	Senator Deb Fischer	Legislative Aide
Craig	Parker	Senator David Perdue	Staff Assistant
Daily	Marjorie	Senator Dan Coats	Legislative Correspondent
DiPlacido	Mark	Senator Ben Sasse	Research Associate

Ditch	David	Senate Budget Committee	Analyst
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Flowers	Darien	Senator Bill Cassidy	Legislative Aide
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Foster	Steven	Senator Steve Daines	Legislative Correspondent
Graham	Joel	Senator David Perdue	Correspondence Manager
Hancock	Lauren	Senator David Perdue	Legislative Correspondent
Harst	Lisa	Senator Tom Cotton	Junior Legislative Assistant
Hunter	Kate	Senator Tim Scott	Legislative Correspondent
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Kinkoff	Richard	Senator Marco Rubio	Correspondence Manager
Lauterbach	Jennifer	Senator Bill Cassidy	Deputy Scheduler/Legislative Correspondent
Lavery	Emily	Senator Tim Scott	Legislative Correspondent
Leavitt	Elise	Senator Mike Lee	Staff Assistant
Ledbetter	Rachel	Senator David Vitter	Press Assistant
Lewis	Katherine	Senator Rand Paul	Legislative Correspondent
Mahan	Jesse	Senator James Lankford	Legislative Correspondent
Mathis	Jenna	Senator Ron Johnson	legislative correspondent
McCabe	Katie	Senator David Perdue	Legislative Correspondent
McCullough	Noah	Senator John Cornyn	Policy Assistant
Miller	Andrew	Senator Ted Cruz	Special Assistant
Mulkin	Elliott	Senator Ted Cruz	Legislative Correspondent
Murrey	Ben	Senator Ted Cruz	Legislative Correspondent

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Pickell	Lindsay	Senator Jeff Sessions	Defense Legislative Correspondent
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Sizemore	Joshua	Senator Daines	Staff Assistant
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Wolfe	Logan	Senator Rand Paul	Legislative Correspondent
Wolfe	Kaity	Senator Grassley	Director of Correspondence